

ForwardHealth Provider Portal RA User Guide

Date Last Updated: March 30, 2010

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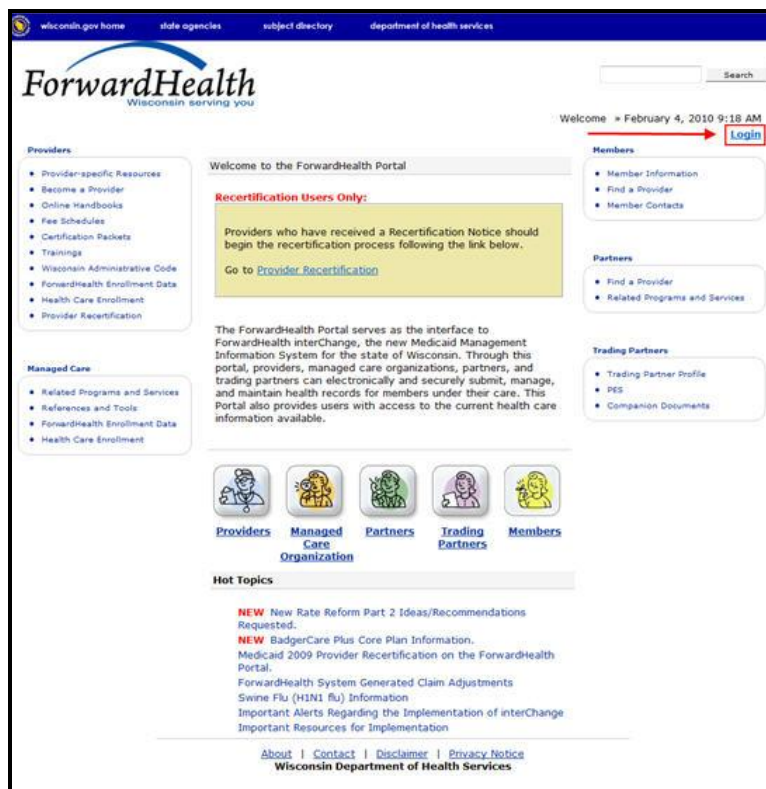
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1 Accessing Remittance Advices on the ForwardHealth Portal

1.1 Access the Remittance Advices Page

To access the Remittance Advices (RA) page:

1. Access the ForwardHealth Portal at www.forwardhealth.wi.gov.
The ForwardHealth Portal home page will be displayed.
2. Click **Login** at the top of window.



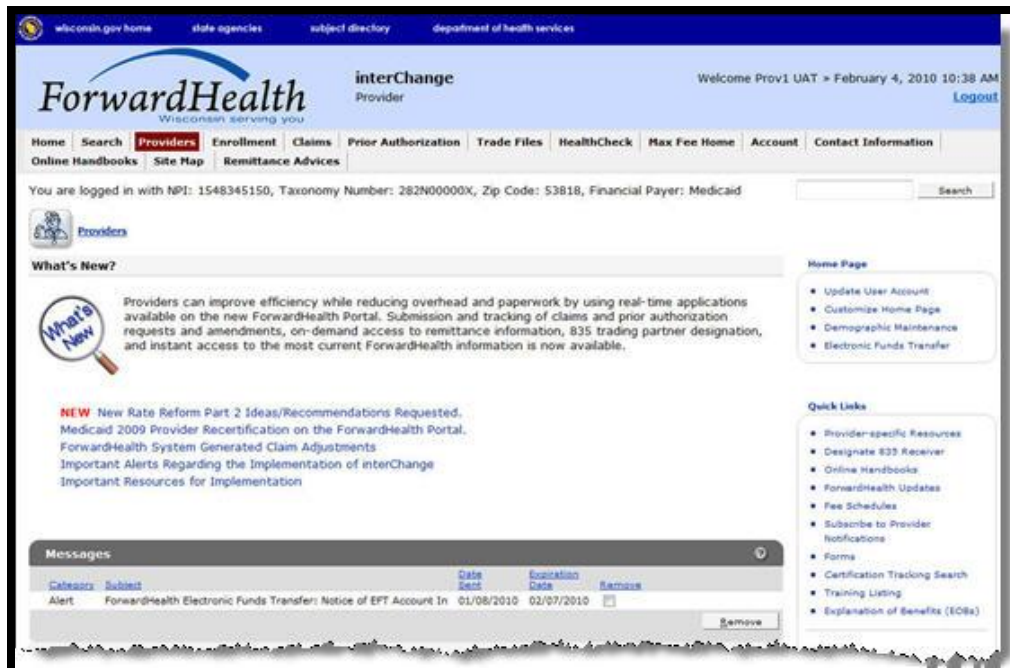
ForwardHealth Portal Home Page

The ForwardHealth Portal login panel will be displayed.



ForwardHealth Portal Login Panel

3. Enter your user name and password to login to your secure provider Portal account.
The secure Portal home page will be displayed.



Secure Portal Home Page

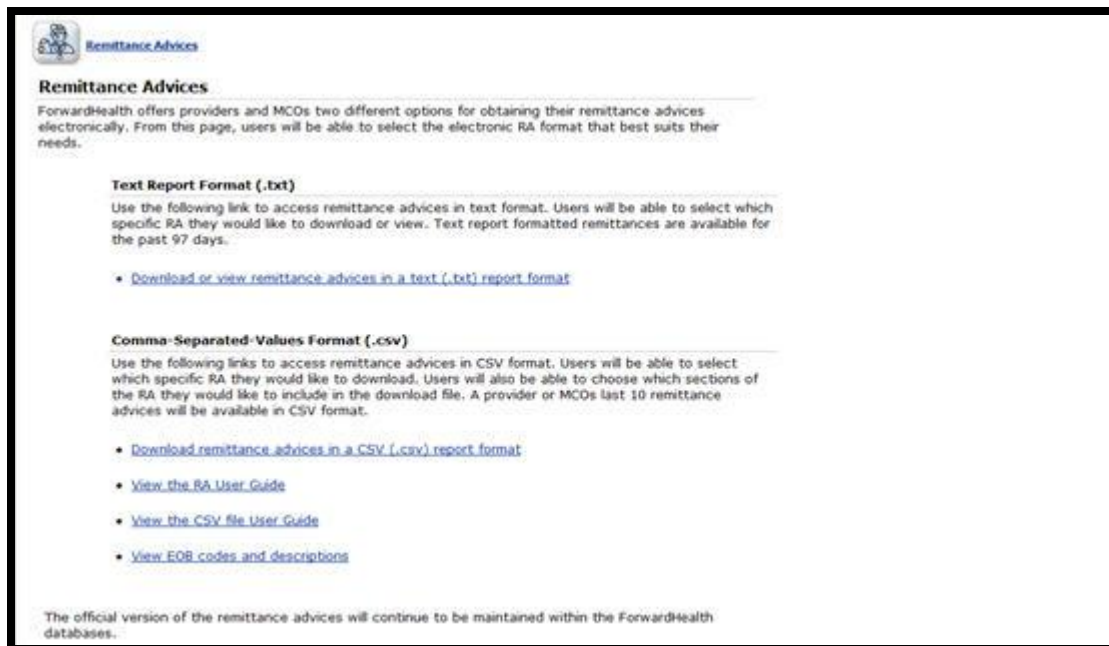
4. Click **Remittance Advices** on the main menu.

Only the account administrator and clerks who are assigned the Remittance Advice role will see this option on the main menu and be able to access RAs on the Portal. See [Section 2](#) in this user guide for instructions on assigning a clerk the Remittance Advice role.



Remittance Advices Link

The Remittance Advices page will be displayed.



Remittance Advices Page

The Remittance Advices page contains links that allow you to view and download your RAs in the Text Report (.txt) and/or Comma-Separated-Values (.csv) formats.

The page also provides links to helpful tools on how to use the RA functionality.

- **Download or view remittance advices in a text (.txt) report format** – allows users to view or download text copies of RAs for the past 97 days.
- **Download remittance advices in a CSV (.csv) report format** – allows users to download their ten most recent RAs in a CSV file.
- **View the RA User Guide** – access basic information on how to use the RA functionality on the ForwardHealth portal.
- **View the CSV File User Guide** – provides basic information on how to use the CSV file containing your RA information. CSV is a file format accepted by a wide range of computer software programs, including spreadsheet programs such as Microsoft® Office Excel (Excel) and database programs, such as Microsoft® Office Access.
- **View EOB codes and descriptions** - explanation of benefit (EOB) codes and descriptions. EOB codes and descriptions will be listed in the txt file, however for the CSV file, only the EOB code will be provided. Refer to this link to view the detailed EOB code and corresponding description or meaning.

1.2 Download Remittance Advices in a CSV Report Format

To download RAs in a CSV Report Format:

1. In the **Comma-Separated-Values Format (.csv)** section of the Remittance Advice page, click **Download remittance advices in a CSV (.csv) report format**.

The **Download RA** page will open displaying a list of the provider's last ten RAs.

Remittance Advices

RA Number	RA Date	Check/EFT Number
311041	03/09/2010	000055388
311002	03/06/2010	000055362
310989	03/05/2010	000055356
310978	03/04/2010	000055349
310963	03/03/2010	000000000
310952	03/02/2010	000000000
310915	02/25/2010	000000000
310875	02/19/2010	000055315
310867	02/18/2010	000055312
310856	02/17/2010	000055304

Select an RA section to download:

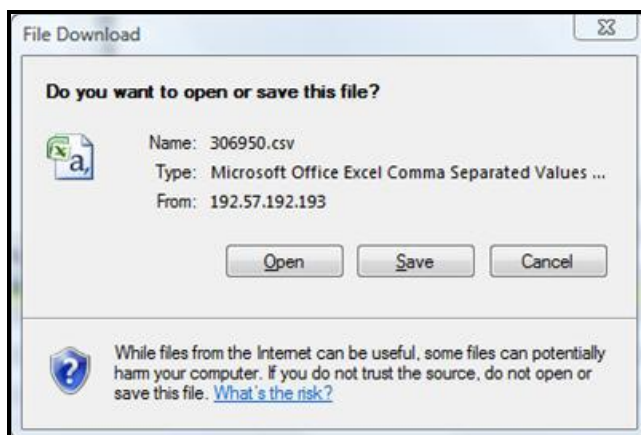
☒ All ☐ Summary ☐ Medicare Crossover - Professional Claims
☐ Payment ☐ Inpatient Claims ☐ Medicare Crossover - Institutional Claims
☐ Payment Hold ☐ Outpatient Claims ☐ Compound Drug Claims
☐ Service Codes ☐ Professional Service Claims ☐ Drug Claims
☐ Financial Transactions ☐ Long Term Care Claims ☐ Dental Claims

Submit Cancel

Download RA Page

- Click anywhere on a line to select an RA.
- In the **Select an RA section to download** section, the **All** checkbox will be automatically checked by default. This will download the entire RA. To download only selected sections of the RA, uncheck the All box and check one or more individual sections to download.
- Click **Submit**.

The file will be processed and the **File Download** window will be displayed.

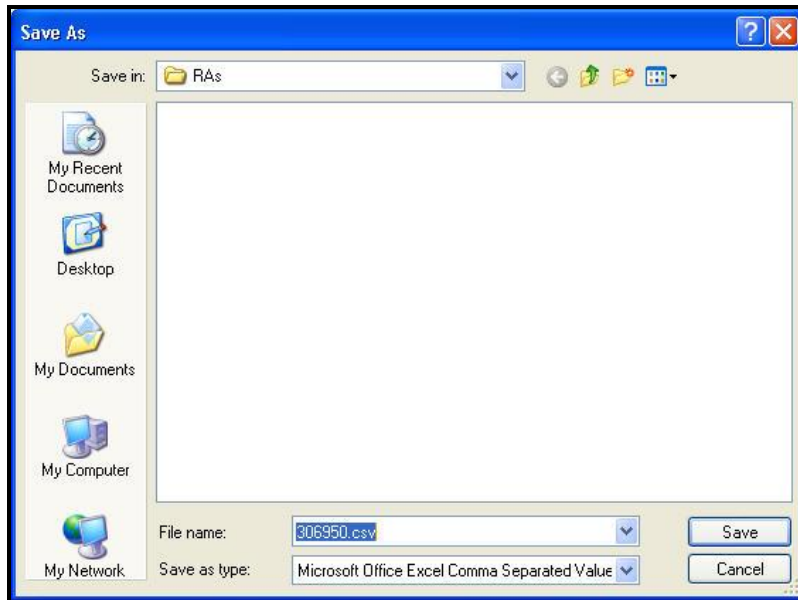


File Download Window

Note: You must choose to first **Save the file to your desktop** in order to properly download the file and format it as a spreadsheet document.

5. Click **Save**.

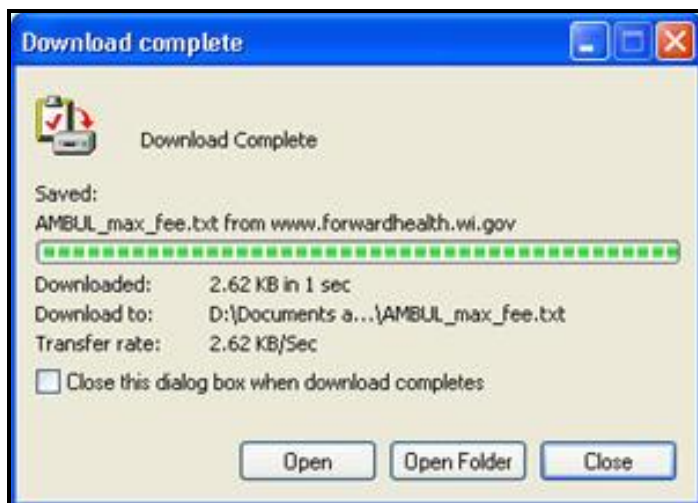
The **Save As** window will be displayed.



Save As Window

6. Browse to the location on your computer or network location where you want to save the file and click **Save**.

The file will begin to download. Note that it could take several minutes for the file to download depending on the size of the RA file. Once the file is completely downloaded, the **Download Complete** window will be displayed.



Download Complete

7. Click **Open**.

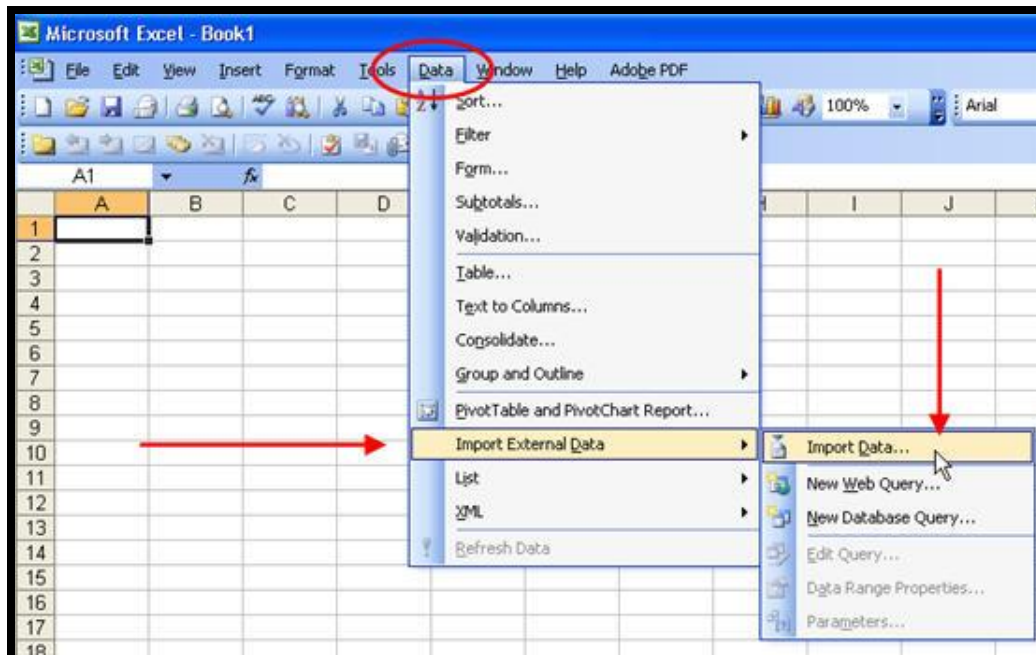
The screenshot shows a Microsoft Excel spreadsheet titled "Microsoft Excel - 306950(1).csv". The spreadsheet contains a table with columns labeled A through P. The data is organized into rows, with some rows starting with a date and time (e.g., 10/23/2000 4:55E+08). The table includes various codes and identifiers, such as "RA#", "ICN", "Claim Sta", "Detail #", "Member L", "Member F", "Member M", "PCN", "MRN", "Adjustment", "Rev Code", "From DOS", "To DOS", "Covered C", "Admit", "Dat", "DRG", "Allowed U", and "PA N". The data appears to be a list of transactions or claims, with some rows showing a "0 Mouse" entry in column A. The spreadsheet is displayed in a window with standard Windows controls and a toolbar.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	
1	RA#	10	Check/EF	Payment	NPI	Payee ID	Payee ID	Provider N	Provider A	Provider A	Provider C	Provider S	Provider Zip Code			
2	307361	10	5:55E+08	11/23/2000	2 03E+09	4 9E+14	MEM	Madison E	6406 Bnd	Suite 29	Monroa	WI	53716			
3	RA#	20	Reference	Total Amc	Hold Reason											
4	RA#	20	Reference	Transact#	ICN	Amount Held										
5	307361	20	2 12E+08	2E+08	Missing Payment	from transaction	439504449									
6	307361	20	2 32E+08	Input Clair	2 21E+12	25										
7	307361	20	2 32E+08	25	Late Payment											
8	307361	20	2 12E+08	Output Cl	2 21E+12	2E+08										
9	RA#	30	SVC Code	Description												
10	307361	30	12964	Doctor Visit												
11	307361	30	13648	Open Bypass Surgery												
12	RA#	40	ICN	Claim Sta	Detail #	Member L	Member F	Member M	PCN	MRN	Adjustment	Mother ICN	From DOS	To DOS	Covered C	Admit
13	RA#	40	ICN	Claim Sta	Detail #	Member L	Member F	Member M	PCN	MRN	Adjustment	From DOS	To DOS	Covered C	Admit	Dat
14	RA#	40	ICN	Claim Sta	Detail #	Member L	Member F	Member M	PCN	MRN	Adjustment	Rev Code	From DOS	To DOS	Covered C	Admit
15	307361	40	5 21E+12	A	0	Mouse	Mickey	2 04E+11	6 52E+11	2 96E+11	Y	11/20/200	11/21/200	2	11/20/200	:
16	307361	40	5 21E+12	A	0	Mouse	Mickey	2 04E+11	6 52E+11	2 96E+11	Y	11/20/200	11/21/200	2	11/20/200	:
17	307361	40	5 21E+12	A	0	Mouse	Mickey	2 04E+11	6 52E+11	2 96E+11	Y	11/20/200	11/21/200	2	11/20/200	:
18	307361	40	5 21E+12	A	0	Mouse	Mickey	2 04E+11	6 52E+11	2 96E+11	Y	11/20/200	11/21/200	2	11/20/200	:
19	307361	40	5 21E+12	A	0	Mouse	Mickey	2 04E+11	6 52E+11	2 96E+11	Y	11/20/200	11/21/200	2	11/20/200	:
20	307361	40	5 21E+12	A	0	Mouse	Mickey	2 04E+11	6 52E+11	2 96E+11	Y	11/20/200	11/21/200	2	11/20/200	:
21	307361	40	5 21E+12	A	0	Mouse	Mickey	2 04E+11	6 52E+11	2 96E+11	Y	11/20/200	11/21/200	2	11/20/200	:
22	307361	40	5 21E+12	A	0	Mouse	Mickey	2 04E+11	6 52E+11	2 96E+11	Y	11/20/200	11/21/200	2	11/20/200	:
23	307361	40	5 21E+12	A	0	Mouse	Mickey	2 04E+11	6 52E+11	2 96E+11	Y	11/20/200	11/21/200	2	11/20/200	:
24	307361	40	5 21E+12	A	0	Mouse	Mickey	2 04E+11	6 52E+11	2 96E+11	Y	11/20/200	11/21/200	2	11/20/200	:
25	307361	40	5 21E+12	A	0	Mouse	Mickey	2 04E+11	6 52E+11	2 96E+11						

Once you've retrieved the CSV file, immediately save it to disk as a CSV file before making any changes. This will avoid the need to download the original file again should you run into problems afterwards.

1.2.1 Importing the CSV File to a Spreadsheet

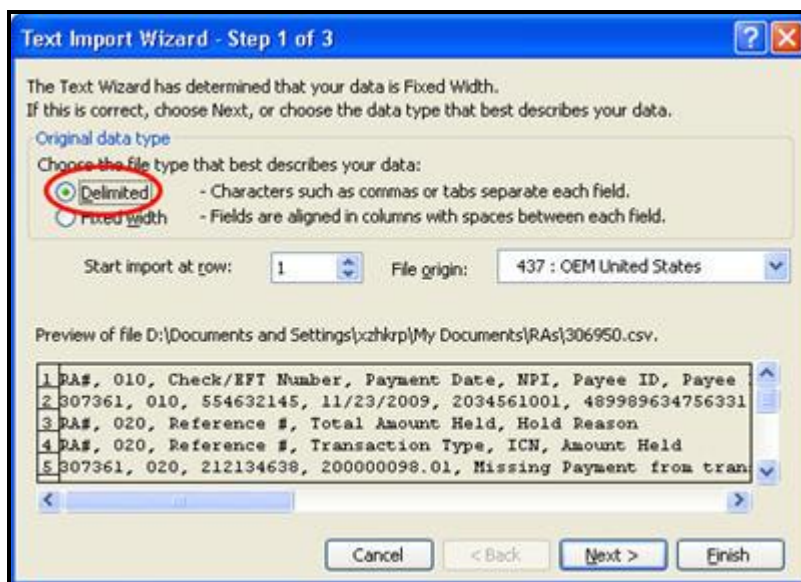
1. Open a blank Excel spreadsheet.



Blank Spreadsheet

- From the main menu at the top of the page, click **Data**.
- From the drop-down menu that opens, select **Import External Data>Import Data**.


The Text Import wizard will be displayed.



Text Import Wizard Step 1

- In the **Original data type** section, click **Delimited**.
- Click **Next**.

Step 2 of the wizard will be displayed.



This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☐ Tab ☐ Semicolon ☒ Comma ☐ Treat consecutive delimiters as one

☐ Space ☐ Other: Text qualifier:

Data preview

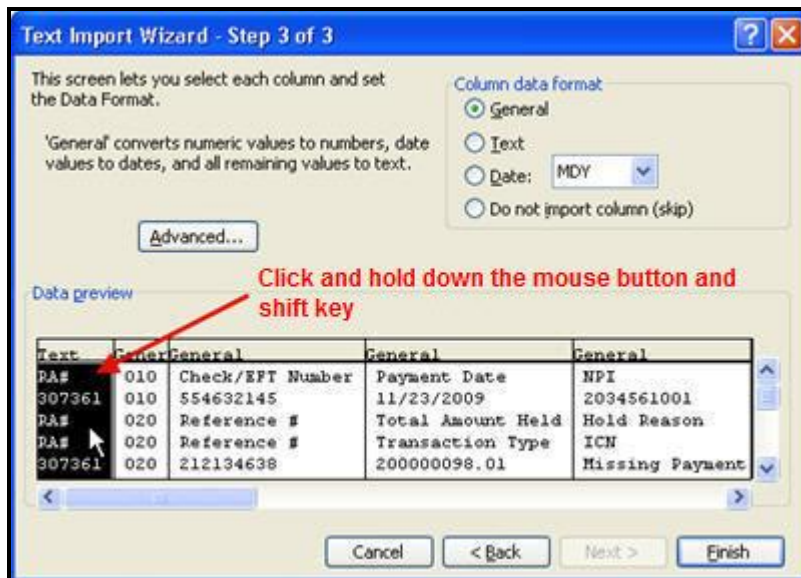
PA#	010	Check/EFT Number	Payment Date	NPI
307361	010	554632145	11/23/2009	2034561001
PA#	020	Reference #	Total Amount Held	Hold Reason
PA#	020	Reference #	Transaction Type	ICN
307361	020	212134638	200000098.01	Missing Payment

Cancel < Back Next > Finish

Text Import Wizard Step 2

6. Check the **Comma** box and make certain that no other boxes are checked.
7. Click **Next**.

Step 3 of the Text Import Wizard will be displayed.



This screen lets you select each column and set the Data Format.

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Advanced...

Column data format

☒ General ☐ Text ☐ Date: MDY ☐ Do not import column (skip)

Data preview

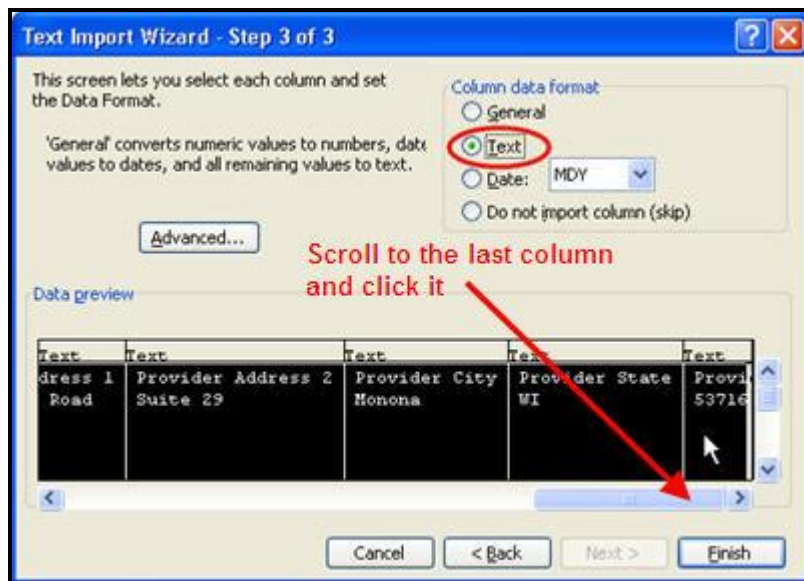
Click and hold down the mouse button and shift key

Text	EnterGeneral	General	General	General
PA#	010	Check/EFT Number	Payment Date	NPI
307361	010	554632145	11/23/2009	2034561001
PA#	020	Reference #	Total Amount Held	Hold Reason
PA#	020	Reference #	Transaction Type	ICN
307361	020	212134638	200000098.01	Missing Payment

Cancel < Back Next > Finish

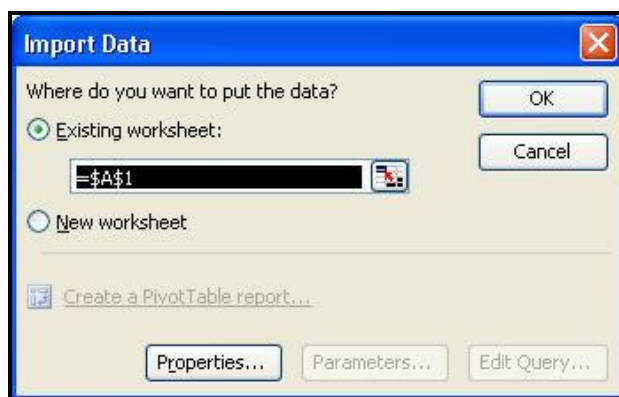
Text Import Wizard Step 3

8. Click in the first column and hold down the left mouse button and the **shift** key.



9. Use the horizontal scroll bar to scroll to the far right and click in the last column. All the columns should now be selected (highlighted).
10. In the **Column data format** section at the top right of the wizard, click **Text**.
11. Click **Finish**.

The Import Data window will be displayed.



Import Data Window

12. Choose if you want to put the data into a new or existing worksheet.
13. Click **OK**.

The spreadsheet will populate with the RA information. You can now sort or manipulate the data as needed.

1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1		10	Check/El Payment Payor	NPI	Payee IC	Payee Ty	Provider	Provider	Provider	Provider	Provider	Provider	Provider	Provider	Provider	Provider Zip Code	
2	310867	10	55312	02/19/20 TXIX		11010200 MCD	BELLIN H BOX 234I	ATTN CA	GREEN B	WI				54305-			
3	RA#	30	SVC Cod	Description													
4	310867	30	70007	THYROID IMAGE, MULT UPTAKES													
5	310867	30	120	ROOM & BOARD - SEMI-PRIVATE TWO BED GENERAL CLASSIFICATION ROOM-BOARD/SEMI													
6	310867	30	18	INPATIENT CROSSOVERS													
7	310867	30	250	PHARMACY (ALSO SEE 063X - AN EXTENSION OF 025X) GENERAL CLASSIFICATION PHARMACY													
8	310867	30	300	LABORATORY GENERAL CLASSIFICATION LABORATORY OR (LAB)													
9	310867	30	341	NUCLEAR MEDICINE DIAGNOSTIC PROCEDURES NUC MED/DX													
10	RA#	40	ICN	Claim St: Detail #	Member	Member	Member PCN	MRN	Adjustm	From DC	To DOS	Covered	Admit Dat	DRG code	Billed An		
11	RA#	40	ICN	Claim St: Detail #	Member	Member	Member PCN	MRN	Adjustm	Previous	From DC	To DOS	Covered	Admit Dat	DRG code		
12	RA#	40	ICN	Claim St: Detail #	Member	Member	Member PCN	MRN	Adjustm	Rev Code	From DC	To DOS	Covered	Admit Dat	DRG code		
13	310867	40	22100500 D	0	ANDERS EDDIE	39425120 Patient /	M000595 N			01/27/20	01/29/20	2	01/27/20	774	1353.8		
14	310867	40	22100500 D	1	ANDERS EDDIE	39425120 Patient /	M000595 N			170	08/27/20	08/29/20	0		1000		
15	310867	40	22100500 D	2	ANDERS EDDIE	39425120 Patient /	M000595 N			250	08/27/20	08/29/20	0		20.8		
16	310867	40	22100500 D	3	ANDERS EDDIE	39425120 Patient /	M000595 N			300	08/27/20	08/29/20	0		256		
17	310867	40	22100500 D	4	ANDERS EDDIE	39425120 Patient /	M000595 N			306	08/27/20	08/29/20	0		77		
18	310867	40	22100500 D	0	JOKELE MARY	90100006 Patient /	M000605 N			09/30/20	10/04/20	4	09/30/20	774	2920		
19	310867	40	22100500 D	1	JOKELE MARY	90100006 Patient /	M000605 N			0	09/30/20	10/04/20	0		2920		
20	310867	40	22100500 D	0	SMITH SAM	39376427 Patient /	M000605 N			10/14/20	11/18/20	4	10/31/20	774	6816.93		
21	310867	40	22100500 D	1	SMITH SAM	39376427 Patient /	M000605 N			120	10/31/20	11/04/20	0		2920		
22	310867	40	22100500 D	2	SMITH SAM	39376427 Patient /	M000605 N			250	10/31/20	11/04/20	0		496.43		
23	310867	40	22100500 D	3	SMITH SAM	39376427 Patient /	M000605 N			258	10/31/20	11/04/20	0		157		

RA Spreadsheet

For information on reading the imported file, please refer to the CSV File User Guide located on the Remittance Advices page on the ForwardHealth Portal.

1.3 View Remittance Advices

Users can view text copies of their RAs for the past 97 days using the link in the **Text Report Format (.txt)** section of the Remittance Advice page.

1. To view the most recent RAs for the logged in provider ID, click **Download or view remittance advices in a text (.txt) report format**.

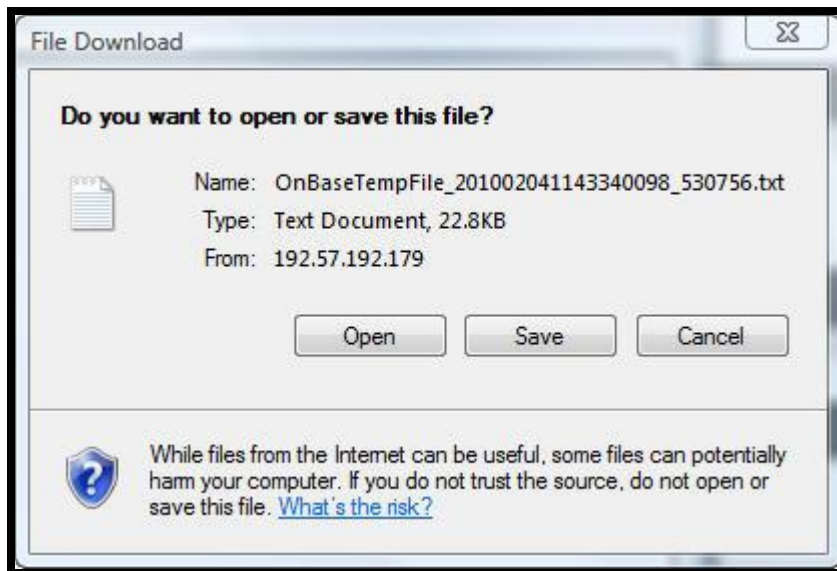
The OnBase document viewer will be displayed in a separate browser window showing the most recent RAs.

Document ID	Description
268204	10/03/2008 - CRA-BANN-R: Remittance Advices - PHI - TXIX - 178116 - 11000600 MCD
356635	11/07/2008 - CRA-BANN-R: Remittance Advices - PHI - TXIX - 256870 - 11000600 MCD
187811	09/26/2008 - CRA-BANN-R: Remittance Advices - PHI - TXIX - 99716 - 11000600 MCD
350453	10/17/2008 - CRA-BANN-R: Remittance Advices - PHI - TXIX - 256498 - 11000600 MCD
173371	09/03/2008 - CRA-BANN-R: Remittance Advices - PHI - TXIX - 88967 - 11000600 MCD
169048	08/29/2008 - CRA-BANN-R: Remittance Advices - PHI - TXIX - 88854 - 11000600 MCD
168427	08/27/2008 - CRA-BANN-R: Remittance Advices - PHI - TXIX - 88807 - 11000600 MCD
357394	11/10/2008 - CRA-BANN-R: Remittance Advices - PHI - TXIX - 256902 - 11000600 MCD
184271	09/17/2008 - CRA-BANN-R: Remittance Advices - PHI - TXIX - 92568 - 11000600 MCD
269385	10/08/2008 - CRA-BANN-R: Remittance Advices - PHI - TXIX - 178151 - 11000600 MCD

Document Results Panel

2. Click the RA you wish to view.

The **File Download** window will be displayed.



File Download Window

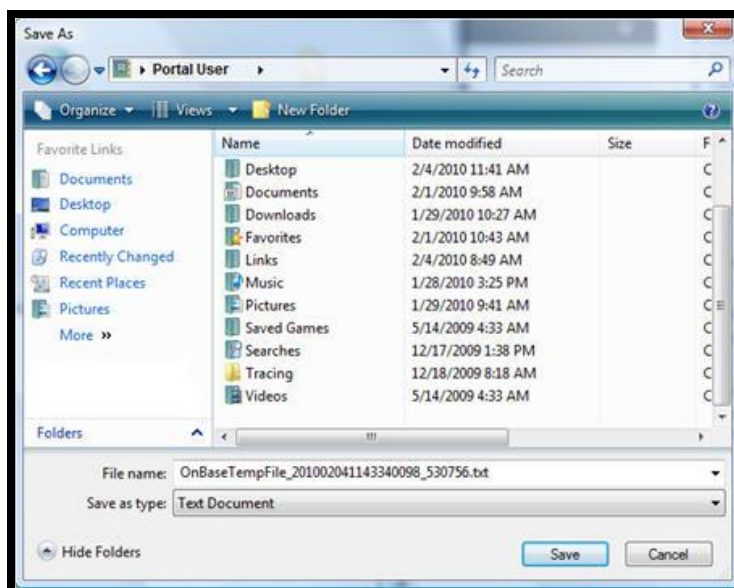
3. You can choose whether to open the RA or save it to you computer or network location.

- Click **Open** if you wish to just view the RA.

The RA will be displayed in a separate window (see the RA Text Report screenshot below).

- Click **Save** if you wish to save the RA.

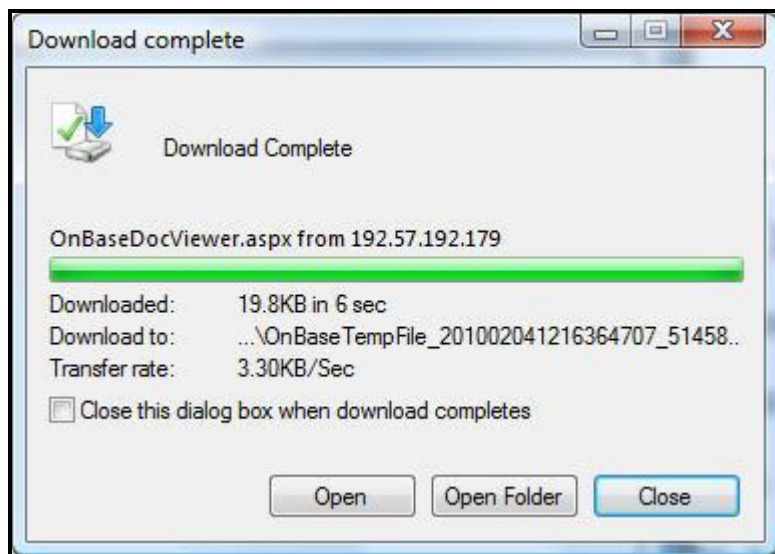
The **Save As** window will be displayed.



Save As Window

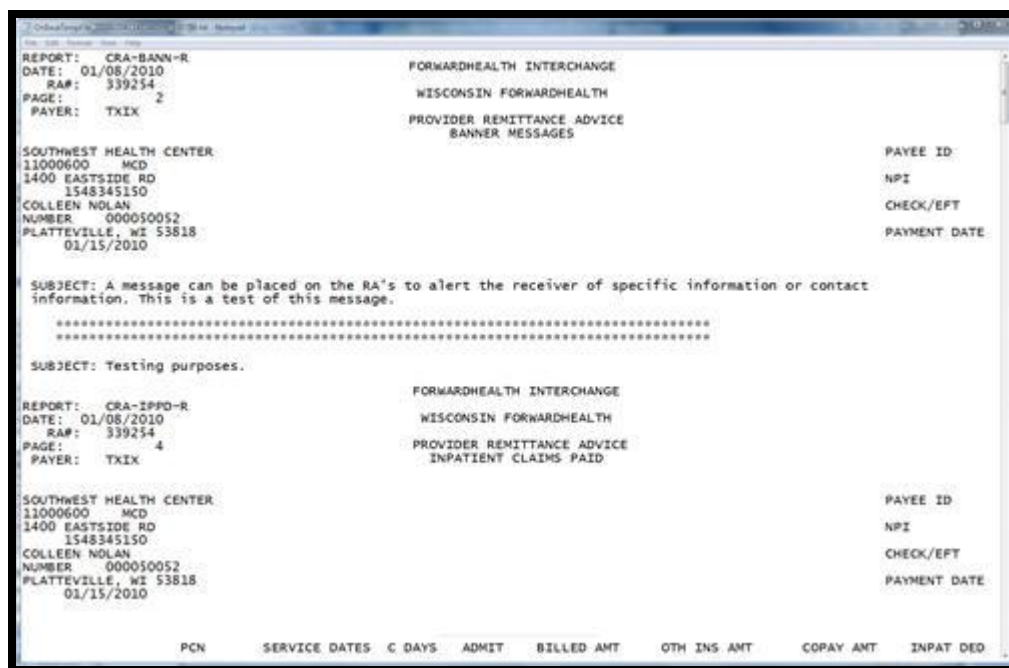
4. Browse to a location on your computer or network where you wish to save the RA and click **Save**.

The **Download complete** window will be displayed.



5. Click **Open** to view the RA.

The RA text report will be displayed in a separate window.



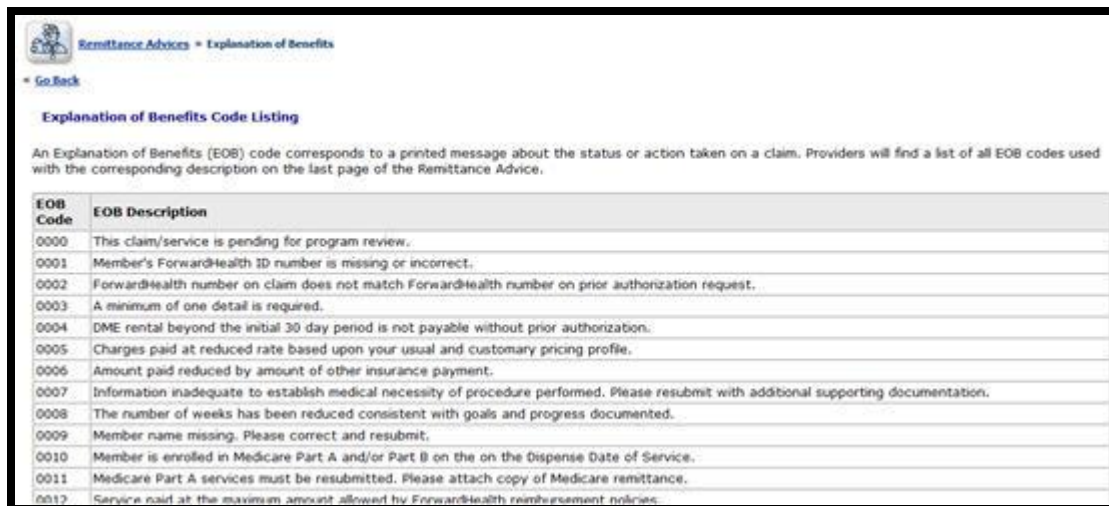
RA Text Report

1.4 View EOB codes and Descriptions

To view **Explanation of Benefits (EOB)** codes and descriptions:

1. Click the **View EOB codes and descriptions** link at the bottom of the **Remittance Advices** page.

The **Explanation of Benefits Code Listing** page will be displayed.



EOB Code	EOB Description
0000	This claim/service is pending for program review.
0001	Member's ForwardHealth ID number is missing or incorrect.
0002	ForwardHealth number on claim does not match ForwardHealth number on prior authorization request.
0003	A minimum of one detail is required.
0004	DME rental beyond the initial 30 day period is not payable without prior authorization.
0005	Charges paid at reduced rate based upon your usual and customary pricing profile.
0006	Amount paid reduced by amount of other insurance payment.
0007	Information inadequate to establish medical necessity of procedure performed. Please resubmit with additional supporting documentation.
0008	The number of weeks has been reduced consistent with goals and progress documented.
0009	Member name missing. Please correct and resubmit.
0010	Member is enrolled in Medicare Part A and/or Part B on the on the Dispense Date of Service.
0011	Medicare Part A services must be resubmitted. Please attach copy of Medicare remittance.
0012	Service paid at the maximum amount allowed by ForwardHealth reimbursement policies.

Explanation of Benefits Code Listing Page

2. Scroll down the view to view the desired EOB.

2 Assigning the Remittance Advice Role to a Clerk

In order for a clerk to view or download RAs, the clerk must be assigned the Remittance Advice role. Only an administrator or a clerk administrator with the RA role can assign the RA role to a clerk.

To assign an RA role to a clerk:

1. From the main menu at the top of the page, click **Account**.



Secure Site Home Page

The Account Home page will be displayed.



Account Home Page

2. In the **What would you like to do?** section, click **Clerk Maintenance**.

The Clerk Maintenance Panel will be displayed.

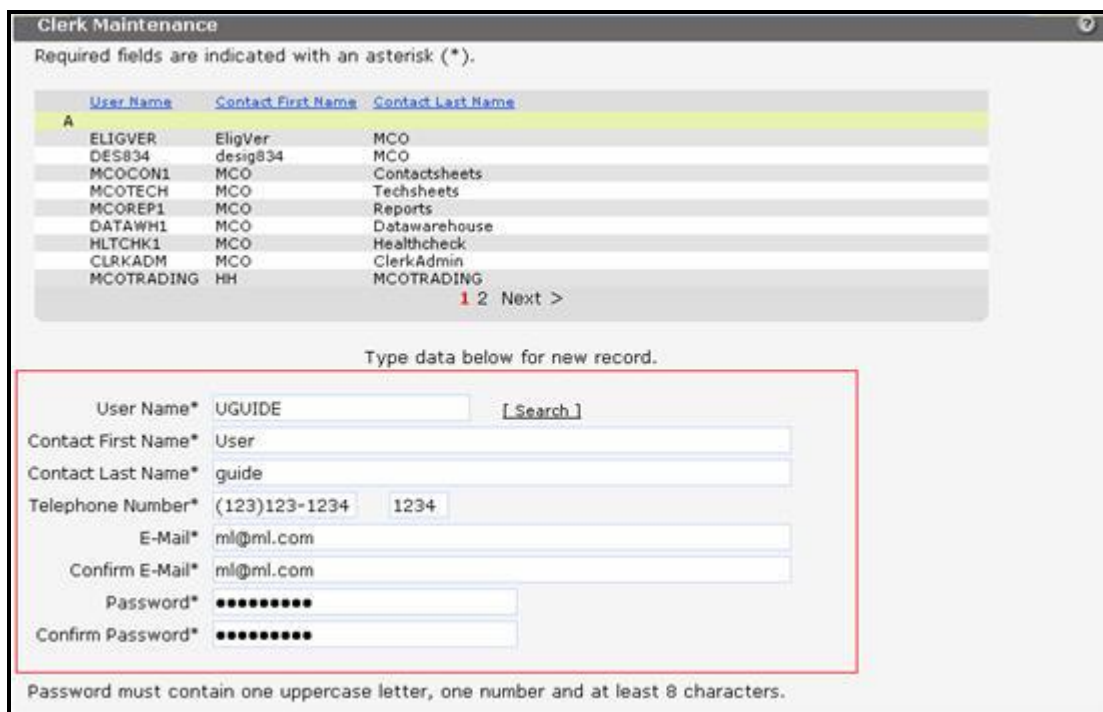
From the Clerk Maintenance Panel, you can either add a new clerk and assign the clerk the RA role, or you can assign the RA role to an existing clerk.

2.1 Add a Clerk

Note: Only Account Administrators or existing Clerk Administrators may add a new clerk.

1. On the Clerk Maintenance Panel, click the **Add Clerk** button, located near the bottom right corner of the panel.

The panel refreshes, displaying a new yellow row marked with an **A** as shown below. This row serves as a placeholder for the new entry.



Clerk Maintenance
Required fields are indicated with an asterisk (*).

User Name	Contact First Name	Contact Last Name
ELIGVER	EligVer	MCO
DES834	desig834	MCO
MCOCON1	MCO	Contactsheets
MCOTECH	MCO	Techsheets
MCOREP1	MCO	Reports
DATAWH1	MCO	Datawarehouse
HLTCHK1	MCO	Healthcheck
CLRKADM	MCO	ClerkAdmin
MCOTRADING	HH	MCOTRADING

1 2 Next >

Type data below for new record.

User Name* UGUIDE [Search]
 Contact First Name* User
 Contact Last Name* guide
 Telephone Number* (123)123-1234 1234
 E-Mail* ml@ml.com
 Confirm E-Mail* ml@ml.com
 Password*
 Confirm Password*

Password must contain one uppercase letter, one number and at least 8 characters.

2. Choose a **User Name** and enter it in the space provided.
3. Enter the new clerk's **First Name** and **Last Name** in the spaces provided.
4. Enter the new clerk's **Telephone Number** and extension (if applicable) in the spaces provided.
5. Enter the new clerk's **E-Mail address** (twice for confirmation) in the spaces provided. Select an initial **Password** for the new clerk and enter it twice for confirmation in the spaces provided. (The password may be changed later by the individual.)

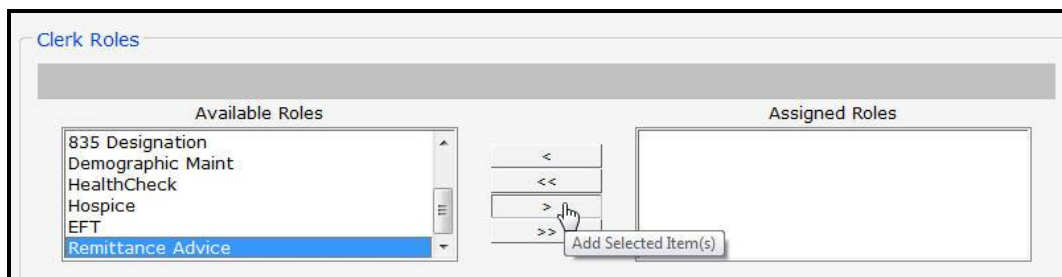
Note: The Password MUST contain at least one uppercase letter and one number.

2.2 Add the Remittance Advice Role to a Clerk

Note: Only Account Administrators or existing Clerk Administrator with the RA role may assign the RA role to a clerk.

To add the Remittance Advice role to a new or existing clerk.

1. Scroll down to the **Clerk Roles** section of the Clerk Maintenance panel and select Remittance Advice from the available roles.



Clerk Roles

Available Roles

- 835 Designation
- Demographic Maint
- HealthCheck
- Hospice
- EFT
- Remittance Advice

Assigned Roles

Add Selected Item(s)

Clerk Roles Section

2. Click the > arrow.

The Remittance Advice role will be added to the clerk's assigned roles.

The screenshot shows a web interface titled "Clerk Roles". It features two main panels: "Available Roles" on the left and "Assigned Roles" on the right. The "Available Roles" panel contains a list of roles: Claim Submission, 835 Designation, Demographic Maint, HealthCheck, Hospice, and EFT. The "Assigned Roles" panel contains a single role: Remittance Advice. Between the two panels are four buttons: a single right arrow (>), a double right arrow (>>), a single left arrow (<), and a double left arrow (<<). The "Remittance Advice" role in the "Assigned Roles" panel is highlighted with a blue background.

3. Click **Submit** at the bottom of the panel.

If the save was successful, a confirmation message will be displayed at the top of the panel.

The screenshot shows a confirmation message box with a black background and white text. The text reads: "The following messages were generated:" followed by "Clerk Maintenance - Save was Successful".

If there are any problems with the save, an error message will display here instead.